Xero Training
Xero Essentials

Introduction

This one day course is designed to build and develop the skills necessary to effectively use Xero in any environment. Whether you are a business owner managing your own business or an accountant or bookkeeper managing a number of clients.

Duration: 1 day

Class size: 10 students max

Times: 9:00am - 5:00pm

Price: *Refer to our website for current course and package pricing*

After the course?

Each student will receive:

• Certificate of completion
• Training manual
• 12 months FREE email support
• FREE class re-sit (if necessary)

About The Course

During this 1 day hands-on course, participants will develop the skills necessary to navigate and utilise the various features of Xero. Participants will work through real world examples to gain a working knowledge that will allow for day to day use of the Xero accounting software. All courses are taught by experienced Xero consultants with real world bookkeeping experience.

Who Should Do This Course?

This course is intended for those who wish to learn how to use the Xero accounting software to manage the day to day operations of a small or medium sized business. It is ideal for bookkeepers, accountants and business owners just starting out with Xero, or for those looking to transition from other accounting platforms.

Prerequisites

This course is suitable for participants with some experience using other accounting packages and want to get up to speed with Xero. Participants must come ready with a username and password to access their own Xero account or Xero trial account.

Content

Unit 1: Xero Essentials

• Cloud Based Accounting
• Understanding Logins, Access and Pricing
• Understanding My Xero
• Access My Xero
• Access the Xero Demo Company
• Creating A New Organisation
• Completing The Setup Guide
• Understanding The Xero Dashboard
• Understanding The Xero Menus, Icons & Tabs

• Getting Help & Support
• Understanding Xero Notifications
• Understanding Xero Files
• Uploading A File to the Inbox
• Taking A Photo
• Emailing A File to the Inbox
• Creating A Folder
• Create A Transaction From Files

Unit 2: Xero Setup

- Understanding Organisation Settings
- Understanding Financial Settings
- Understanding Tracking Categories
- Creating Tracking Categories
- Rename A Tracking Category
- Archive Or Delete A Tracking Category
- Restore A Tracking Category
- Understanding Multi-Currency
- Adding A Currency
- View Or Edit A Currency
- Understanding Tax Rates
- Add A Tax Rate
- Understanding Email Settings
- Create An Email Template
- View or Edit An Email Template
- Add An Email Address
- Add A Custom Contact Link
- Send A Xero Network Invite (Xero to Xero)
- Understanding Add-ons

Unit 3: Users

- Understanding User Roles
- Adding A User
- Editing A User
- Removing A User
- Inviting Xero Support

Unit 4: Chart of Accounts

- Understanding Chart Of Accounts
- Account Input Fields
- Importing A Chart Of Accounts
- Adding An Account
- Editing An Account
- Deleting An Account
- Archiving An Account
- Restoring An Account
- Exporting A Chart Of Accounts

Unit 5: Bank Accounts

- Understanding Bank Accounts & Bank Feeds
- Adding A Bank Account
- Adding A Credit Card
- Establishing Bank Account Feeds
- Establishing Credit Card Feeds
- Adding A PayPal Account
- Establishing PayPal Feeds
- Account Transactions
- Creating A Spend Money Transaction

- Creating A Receive Money Transaction
- Creating A Transfer Money Transaction
- Archiving A Bank Account
- Restoring A Bank Account
- Bank Rules
- Creating A Bank Rule
- Editing A Bank Rule
- Bank Statements & Importing
- Importing A Bank Statement

Unit 6: Contacts

- Understanding Contacts
- Contact Input Fields
- Importing Contacts
- Creating A Contact Group
- Allocating To A Contact Group
- Adding A Contact
- Editing A Contact
- Archiving A Contact
- Restoring A Contact
- Merging Contacts
- Exporting Contacts

Unit 7: Invoicing - Sales

- Understanding Invoice Settings
- Adding A Payment Service
- Branding Theme Input Fields
- Creating A Branding Theme
- Editing, Copying & Deleting A Branding theme
- Understanding The Sales Dashboard
- Invoice States
- Invoice Input Fields
- Creating A New Invoice
- Attaching Files To Invoices
- Editing An Invoice
- Copying An Invoice
- Voiding An Invoice
- Emailing An Invoice
- Printing An Invoice
- Recording A Payment
- Sending Receipts
- Searching Invoices
- Understanding Repeating Invoices
- Creating A Repeating Invoice
- Understanding Credit Notes
- Creating A Credit Note
- Importing Invoices
- Understanding Statements
- Sending A Statement
- Batch Deposits

Unit 8: Purchases

- Understanding The Purchases Dashboard
- Bill States
- Bill Input Fields
- Creating A New Bill
- Attaching Files To Bills
- Editing A Bill
- Copying A Bill
- Voiding A Bill
- Importing Bills
- Recording A Payment
- Sending A Remittance
- Searching Bills
- Understanding Repeating Bills
- Creating A Repeating Bill
- Understanding Credit Notes
- Creating A Credit Note
- Understanding Batch Payments
- Creating A Batch Payment

Unit 9: Reconciliation

- Understanding Reconciliation
- The Reconciliation Screen
- Cash Coding
- Bank Statement
- Account Transactions
- Matching
- Part Payments
- Minor Adjustments
- Prepayments
- Overpayments
- Creating Spend And Receive Transactions
- Auto Suggestion
- Transfers Between Bank Accounts
- Discuss Tab
- Editing Transactions
- Editing a Transaction
- Reconciliation Report

Unit 10: Reports

- Understanding Reports
- Common Reporting Functions
- Adding A Summary
- Adding A Footnote
- Save A Report (Draft)
- Publish A Report
- Export A Report
- Understanding Report Layout Options
- Creating A Layout
- Apply A Layout
- Edit A Layout
- Delete A Layout
- Understanding Report Layout Options
- Create A Budget
- Import A Budget
- Export A Budget

Unit 11: Activity Statement

- Understanding Activity Statements
- Complete A Business Activity Statement (BAS)
- Complete A Instalment Activity Statement (IAS)

Looking for course dates?

To view a full list of course dates, please visit our website at **www.dynamicwebtraining.com.au**
Alternatively please contact our office on **1300 888 724**